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**Education - school finance** 

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School aid and school district revenue limit

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SCOTT McCALLUM GOVERNOR GEORGE LIGHTBOURN SECRETARY Office of the Secretary Post Office Box 7864 Madison, WI 53707-7864 Voice (608) 266-1741

Fax (608) 267-3842 TTY (608) 267-9629

Date:

To:

Steve Miller

Legislative Reference Bureau

From:

**Bob Hanle** 

State Budget Office

Subject:

Drafting Request - School Aids

Please draft the following:

- 1. Reduce the appropriation under s. 20.255 (2) (ac) by \$150,000,000 in FY 2002-2003.
  - 2. Replace the formula for calculating the revenue limit increase under s. 121.91 (2m)(e)2 with a flat \$60 per pupil increase.
  - 3. Include language requesting (but not requiring) school districts to accommodate any reduction to the revenue limit increase under s. 121.91(2m)(e)2, as it existed prior to this act, without impacting the school district's instructional program.
  - V4. Require the state superintendent to provide technical assistance to school districts to accommodate reductions to the revenue limit increase without impacting instructional programs.
  - Notwithstanding the definition of partial school revenues under s. 121.15 (3m)(a)1, limit the amount of the long-term debt service levy (referred to be DPI as Fund 30 costs) included in partial school revenues to the actual levy or \$480 million. whichever is less.

I will be on vacation the week of December 24. If you have any questions regarding this request, call me at home (238-7485) or call Peter Maternowski (266-5565).

Cc: Peter Grant

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Date (time) needed

Use the appropriate components and routines developed for bills.

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[Note: See section 4.02 (2) (br), Drafting Manual, for specific order of standard phrases.]

### Analysis by the Legislative Reference Bureau

If titles are needed in the analysis, in the component bar:

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For the analysis text, in the component bar:

For the text paragraph, execute: ..... create  $\rightarrow$  anal:  $\rightarrow$  text

The people of the state of Wisconsin, represented in senate and assembly, do enact as follows:

SECTION #.

Section #. 20.255 (2) (ac) of the statutes is amended to read:

Act 16,

20.255 (2) (ac) General equalization aids. A sum sufficient for the payment of educational aids under ss. 121.08, 121.09, and 121.105 and subch. VI of ch. 121 equal to \$3,767,893,500 in the 1999-2000 fiscal year and equal to the amount determined by the joint committee on finance under s. 121.15 (3m) (c) in each fiscal year thereafter.

History: 1971 c. 42, 56, 125; 1971 c. 152 s. 38; 1971 c. 154 s. 80; 1971 c. 211 ss. 24, 126; 1971 c. 215; 1973 c. 89 s. 20 (2); 1973 c. 90, 190, 243, 300, 307, 333, 336; 1975 c. 39 ss. 97 to 109, 732 (1); 1975 c. 105, 220, 224, 395; 1977 c. 26 s. 75; 1977 c. 29; 1977 c. 83 s. 26; 1977 c. 418 ss. 88m to 90, 929 (55); 1979 c. 34 ss. 164 to 191, 2102 (43) (a); 1979 c. 221 ss. 96e to 97w, 2200 (43); 1979 c. 331; 1979 c. 346 ss. 9, 15; 1981 c. 20, 86, 169; 1981 c. 314 s. 146; 1983 a. 22 s. 6; 1983 a. 27 ss. 158 to 212, 2200 (42), 2202 (42); 1983 a. 192; 1983 a. 333 s. 6; 1983 a. 370; 1985 a. 29, 56, 75, 120; 1987 a. 27, 339, 399; 1989 a. 31, 56, 114, 122, 269, 299, 309, 336, 359; 1991 a. 32, 39, 196, 269; 1993 a. 16, 168, 367, 377, 437, 454, 458, 490, 491; 1995 a. 27 ss. 563, 567 to 599, 622, 623, 9145 (1); 1995 a. 49, 227; 1997 a. 27, 113, 164, 237, 252; 1999 a. 9, 185; 2001 a. 16.

dotten amount that you want appropriated in 2002-03 let me know and I'll insert it in this section.

renumbered
121.15(3m)(a) 1. (intru)
and

Section #. 121.15 (3m) (a) 1. of the statutes, as affected by 2001 Wisconsin Act 16, is amended to read:

121.15 (3m) (a) 1. "Partial school revenues" means the sum of state school aids, other than the amounts appropriated under s. 20.255 (2) and (cv), property taxes levied for school districts and aid paid to school districts under s. 79.095 (4), less the amount of any revenue limit increase under s. 121.91 (4) (a) 2. due to a school board's increasing the services that it provides by adding responsibility for providing a service transferred to it from another school board, less the amount of any revenue limit increase under s. 121.91 (4) (a) 30 less the amount of any revenue limit increase under s. 121.91 (4) (j), less the amount of any revenue limit increase under s. 121.91 (4) (h), less the amount of any revenue limit increase under s. 121.91 (4) (h), less the amount of any property taxes levied for the purpose of s. 120.13 (19), and less an amount equal to 45% of the

History: 1977 c. 29 s. 1098; 1977 c. 273; Stats. 1977 s. 121.15; 1979 c. 34; 1985 a. 29, 120; 1987 a. 27; 1989 a. 207; 1993 a. 16, 437; 1995 a. 27 ss. 4073 to 4075m, 9145 (1); 1997 a. 27, 113, 228; 1997 a. 237 ss. 368v to 369, 727p; 1999 a. 9, 17; 2001 a. 16.

amount estimated to be paid under s. 119.23 (4) and (4m).

SEC. CR. 121.15 (3m) (a) 1. g.

121.15 (3m) (a) 1. g. The amount by which the answer of property taxy levy for many long-term debt service exceeds 480,000,000.

Section #. 121.15 (3m) (c) of the statutes is amended to read:

200

121.15 (3m) (c) By June 30, 1999, and annually by June 30 thereafter, the joint committee on finance shall determine the amount appropriated under s. 20.255 (2) (ac) in the following school year.

History: 1977 c. 29 s. 1098; 1977 c. 273; Stats. 1977 s. 121.15; 1979 c. 34; 1985 a. 29, 120; 1987 a. 27; 1989 a. 207; 1993 a. 16, 437; 1995 a. 27 ss. 4073 to 4075m, 9145 (1); 1997 a. 27, 113, 228; 1997 a. 237 ss. 368v to 369, 727p; 1999 a. 9, 17; 2001 a. 16.

SEC. RP. 121.92 (2m) (e) 2.
AN AND LAND SERVICE OF A PROCESS OF A PROCES
SEC. Re, 121,91 (2m) (e) 3.
SEC. (CC. 121-91 (2m) (e) 3.
121. 31 (2m) (d) 3. Ad
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Section #. 121.91 (2m) (e) 3. of the statutes is amended to read:

121.91 (2m) (e) 3. Add the result under subd. 1, to the result under subd. 2

History: 1993 a. 16; 1995 a. 27 ss. 4108m to 4114, 9145 (1); 1997 a. 27, 113, 164, 237, 286; 1999 a. 9, 17, 19, 32, 182, 2001 a. 16.

# STATE OF WISCONSIN – LEGISLATIVE REFERENCE BUREAU – LEGAL SECTION (608–266–3561)

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<b>V</b>
SEC 1210. (5)
5EC. CR. 121.91 (8)
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	ECTION # _ [93 4 0]. Initial applicability;  Public INSTRUCTION 0  1) () REVENUE LIMIT  The treatment of sections  121.91 (2m) (e) 21 and 3.
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(Elia)

[rev: 8/28/00 2001effdate(fm)]

LRB=4095/3 MJL;hmh:pg

# 2001 ASSEMBLY BILL

PRIMARY AND SELVNDARY EDUCATION

AN ACT to amend 121 15 (3m) (a) 1. of the statutes; relating to: limiting the

inclusion of debt levy in the calculation of partial school revenues.

annually

Analysis/by the Legislative Reference Bureau

Under current law, the state mount determine how much general school aid to appropriate to ensure that partial school aid (general school aid and the property tax levy) equals two—thirds of state school aids (general school aids, certain categorical aids, and the school levy tax credit). In other words, the state mount determine how much general school aid to appropriate to pay two—thirds of statewide school costs (two—thirds funding).

This bill excludes from the definition of partial school revenues the amount by which property taxes lewisch the provision is to lower the amount of aid needed to meet two-thirds funding.

For further information see the state and local fiscal estimate, which will be printed as an appendix to this bill.

The people of the state of Wisconsin, represented in sengte-and assembly, do enact as follows:

SECTION 1. 121.15 (3m) (a) of the statutes, as affected by 2001 Wisconsin Act

16, is amended to read:

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#### **2001 – 2002 LEGISLATURE**

LRB-3612/1 PG:kmg:kjf

### **2001 SENATE BILL 261**

October 2, 2001 – Introduced by Senators Baumgart, Plache, Burke, Risser, Moen and Grobschmidt, cosponsored by Bepresentatives Gunderson, Pocan, Ott, Sinicki, Boyle, Staskunas, Plouff, M. Lehman, J. Lehman, La Fave, Meyerhofer, Coggs, Miller, Ryba, Bies and Wasserman. Referred to Committee on Education.

1 2 AN ACT to create 121.91 (4) (n) of the statutes; relating to: increasing a school district's revenue limit for heating costs.

Analysis by the Legislative Reference Bureau

Current law generally limits the increase in the total amount of revenue per pupil that a school district may receive from general school aids and property taxes in a school year to the amount of revenue increase allowed per pupil in the previous school year increased by the percentage change in the consumer price index. Several exceptions are provided. For example, if a school district increases the services that it provides by adding responsibility for providing a service transferred to it from another governmental unit, its revenue limit is increased by the cost of that service.

This bill provides that a school district's revenue limit is increased by an amount equal to the increased cost of heating the school district's buildings in the current school year as compared to the previous school year.

For further information see the *state and local* fiscal estimate, which will be printed as an appendix to this bill.

The people of the state of Wisconsin, represented in senate and assembly, do enact as follows:

SECTION 1. 121.91 (4) (x) of the statutes is created to read:

121.91 (4) (n) The limit otherwise applicable to a school district's revenue under

sub. (2m) in any school year is increased by an amount equal to the amount spent by

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(m) This bill replaces the inflation-bases
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# DRAFTER'S NOTE FROM THE LEGISLATIVE REFERENCE BUREAU

LRB-4490/1dn PG:hmh:pg

January 2, 2002

#### Bob:

- 1. When you know the amount that you want to appropriate under s. 20.255 (2) (ac) in Fy 2002–03, let me know and I'll insert it in Section 1.
- 2. I amended s. 121.15~(3m) (c) because I assumed that the amount appropriated in Fy 2002-03 would be specified in the text of s. 20.255~(2)~(ac). [see 1. above.] OK? In fact you may wish to delay the date in s. 121.15~(3m) (c) until 2004 because the amount appropriated in Fy 2003-04 will be determined in the 2003-05 biennial budget act.
- 3. Instead of requesting school districts to accommodate the revenue limit reduction without negatively affecting their instructional programs, I directed DPI to encourage school districts to do so. OK?

Peter R. Grant Managing Attorney Phone: (608) 267–3362

E-mail: peter.grant@legis.state.wi.us

#### **Grant, Peter**

From:

Hanle, Bob

Sent:

Wednesday, January 02, 2002 3:00 PM

To: Subject: Grant, Peter FW: LRB 4490

For some reason, the system administrator did not like my initial attempt to send this to you.

----Original Message----

From:

Hanle, Bob

Sent:

Wednesday, January 2, 2002 2:58 PM

To:

Peter Grant (E-mail)

Subject:

LRB 4490

Here are my responses to your questions related to LRB 4490-1dn. Also, following my answer to question #3, I have a request for an additional amendment to the draft.

1. When you know the amount that you want to appropriate under s. 20.255 (2) (ac) in Fy 2002-03, let me know and I'll insert it in Section 1.

Answer: After the \$150 million reduction is made to s. 20.255 (2) (ac), the total apporpriation will be \$4,070,645,900 in FY 2002-03.

2. I amended s. 121.15 (3m) (c) because I assumed that the amount appropriated in Fy 2002-03 would be specified in the text of s. 20.255 (2) (ac). [see 1. above.] OK? In fact you may wish to delay the date in s. 121.15 (3m) (c) until 2004 because the amount appropriated in Fy 2003-04 will be determined in the 2003-05 biennial budget act.

Answer: While this goes a bit beyond the scope of what the Governor wants to address in this bill, I think it is a reasonable amendment. Could we extend this language so that the JCF determination procedure applies only the 2nd year in all future biennia (i.e., the odd-numbered fiscal years--FY03, 05, 07, etc.)?

3. Instead of requesting school districts to accommodate the revenue limit reduction without negatively affecting their instructional programs, I directed DPI to encourage school districts to do so. OK?

Answer -- O.K.

I also have an additional amendment to LRB 4490-1. The "primary guaranteed valuation per member" under s. 121.07 (7) (a) should be reduced from the current \$2 million per student to \$1,500,000 per student. The intent is to ensure that "1st tier only" school districts also bear some of the aid reduction.

Thanks much for your prompt drafting.

#### Grant, Peter

From:

Hanle, Bob

Sent:

Thursday, January 03, 2002 11:49 AM

To: Subject: Grant, Peter LRB 4490-1

Importance:

High

After thinking about this a little more and reviewing some data, I would like to amend section 3 of LRB 4490, as follows:

SECTION 3. 121.15 (3m) (a) 1. g. of the statutes is created to read:

121.15 (3m) (a) 1. g. The amount by which the <u>referenda-approved school district</u> property tax levy for <del>long term</del> debt service exceeds \$490,000,000 \$480,000,000.

This wording more accurately reflects how the Fiscal Bureau defines debt in its analysis. I just want to be sure that the number (\$490 million) and the definition are in sync.

I'm assuming that this section is prefaced with the word "less," as in "less the amount by which debt exceeds \$480 million." Reading the on-line statutes it is hard to tell, since 121.15 (3m) (a) 1, under current law, is not divided into subsections.

Be forewarned, the debt service issue is still under discussion. The number (not the definition) could change again.

Thanks.



### State of Misconsin 2001 – 2002 LEGISLATURE

LRB-4490/1/V

DOA:.....Hanle – School aid and school district revenue limit

FOR 2001-03 BUDGET — NOT READY FOR INTRODUCTION

AN ACT ...; relating to: general school aid, school district revenue limits, and making an appropriation.

# Analysis by the Legislative Reference Bureau EDUCATION

#### PRIMARY AND SECONDARY EDUCATION

Under current law, annually the state determines how much general school aid to appropriate to ensure that partial school aid (general school aid and the property tax levy) equals two—thirds of state school aids (general school aids, certain categorical aids, and the school levy tax credit). In other words, the state determines how much general school aid to appropriate to pay two—thirds of statewide school costs (two—thirds funding).

This bill excludes from the definition of partial school revenues the amount by which the property tax levy for long-term debt service exceeds \$480,000,000. The effect of this provision is to lower the amount of aid needed to meet two-thirds funding.

Current law generally limits the increase in the total amount of revenue per pupil that a school district may receive from general school aids and property taxes in a school year to the amount of revenue increase allowed per pupil in the previous school year increased by the percentage change in the consumer price index. This bill replaces the inflation—based adjustment with a flat \$60 per pupil increase beginning with the revenue limit calculated for the 2002—03 school year. The bill also

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on debt that has been approved by a referensin **SECTION 2** f. An amount equal to 45% of the amount estimated to be paid under s. 119.23 1 2 (4) and (4m). 3 SECTION 3. 121.15 (3m) (a) 1. g. of the statutes is created to read: 121.15 (3m) (a) 1. g. The amount by which the property tax levy for leng term debt service exceeds \$4\$0,000,000. biennially 6 Section 4. 121.15 (3m) (c) of the statutes is amended to read: (7) 121.15 (3m) (c) By June 30, 1999 2003, and annually by June 30 thereafter, the joint committee on finance shall determine the amount appropriated under s. 20.255 8 (2) (ac) in the following school year. 10 SECTION 5. 121.91 (2m) (e) 2. of the statutes is repealed. 11 SECTION 6. 121.91 (2m) (e) 3. of the statutes is amended to read: 12 121.91 (2m) (e) 3. Add the result under subd. 1. \$60 to the result under subd. 13 <u>21.</u> SECTION 7. 121.91 (8) of the statutes is created to read: 14 121.91 (8) The department shall encourage school districts to accommodate the 15 reduction in the revenue limit increase resulting from 2001 Wisconsin Act .... (this 16 17 act) without negatively affecting their instructional programs and shall provide 18 technical assistance to school districts for that purpose. SECTION 9340. Initial applicability; public instruction. 19 20 (1) REVENUE LIMIT. The treatment of section 121.91 (2m) (e) 2. and 3. of the 21 statutes first applies to the calculation of a school district's revenue limit for the 2002-03 school year.

Section 9440. Effective dates; public instruction.

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Section #. 121.07 (7) (a) of the statutes is amended to read:

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121.07 (7) (a) The "primary guaranteed valuation per member" is \$2,000,000

History. 1971 c. 125; 1973 c. 61, 90, 190, 333; 1975 c. 39; 1977 c. 29, 178, 418; 1979 c. 34, 221; 1981 c. 20, 317, 385; 1983 a. 27, 212; 1985 a. 29; 1987 a. 27; 1989 a. 31, 114, 309, 336, 359; 1991 a. 39, 269, 315; 1993 a. 16, 437; 1995 a. 27 ss. 4046m to 4064, 9145 (1); 1997 a. 27, 113, 286; 1999 a. 9, 17; 2001 a. 16.

# **2001**

# 3-22

# Nonstat File Sequence: E E I

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## INITIAL APPLICABILITY

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•••	SECTION # [93 A DA]. Initial applicability;  PRIMARY CHARANTED VALUATIONS
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	In the component bar:  For the action phrase, execute:  Create → action: → *NS: → inappl  For the text, execute:  Create → text: → *NS: → inapplA  Nonstatutory subunits are numbered automatically. Fill in the Section # or subsection # only if a  "frozen" number is needed.
	SECTION # Initial applicability;
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#### Grant, Peter

From:

Hanle, Bob

Sent:

Friday, January 04, 2002 12:04 PM

To: Subject: Grant, Peter Draft 4490

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As we discussed on the phone, the following changes should be made to LRB 4490:

• The \$60 revenue increase per pupil should apply only to FY03 (i.e., back to current law in FY04 and thereafter).

• Notwithstanding the \$60 per pupil limit, school boards can vote by supermajority to increase the allowable revenue increase per pupil up to the amount prescribed under s. 121.91 (2m) (e) 2 (as it is written in current law).

• In calculating the amount of revenue increase per pupil in FY04, school boards that did not vote to exceed the \$60 per pupil amount in FY03 (or school boards that voted to exceed the amount, but not up to the maximum allowable amount) will have their FY04 limit calculated as if they had increased their FY03 amount by the maximum allowed under s. 121.91 (2m) (e) 2.

I'll be at home this afternoon. Don't hesitate to call (238-7485) if you have questions. Thanks.

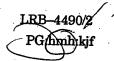
233 + CPI = 240 not 60 + CPI

## STATE OF WISCONSIN – LEGISLATIVE REFERENCE BUREAU – LEGAL SECTION (608–266–3561)

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### State of Misconsin 2001 - 2002 LEGISLATURE



DOA:.....Hanle – School aid and school district revenue limit

FOR 2001-03 BUDGET — NOT READY FOR INTRODUCTION

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AN ACT ...; relating to: general school aid, school district revenue limits, and

making an appropriation.

# Analysis by the Legislative Reference Bureau EDUCATION

#### PRIMARY AND SECONDARY EDUCATION

Under current law, annually the state determines how much general school aid to appropriate to ensure that partial school aid (general school aid and the property tax levy) equals two-thirds of state school aids (general school aids, certain categorical aids, and the school levy tax credit). In other words, the state determines how much general school aid to appropriate to pay two-thirds of statewide school costs (two-thirds funding).

This bill excludes from the definition of partial school revenues the amount by which the property tax levy for the term debt service exceeds \$4,0,000,000. The effect of this provision is to lower the amount of aid/needed to meet two-thirds

funding.

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Under the current three-tiered school aid formula, the first tier of support is for costs shared between the state and school district up to a primary cost ceiling of \$1,000 per pupil. The state's share at this level is calculated using a guaranteed property valuation of \$2,000,000 per pupil. Every school district is guaranteed no less in general aid than this primary aid amount. This bill reduces this primary guarantee to \$1,500,000.

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Current law generally limits the increase in the total amount of revenue per pupil that a school district may receive from general school aids and property taxes in a school year to the amount of revenue increase allowed per pupil in the previous school year increased by the percentage change in the consumer price index. This bill replaces the inflation-based adjustment with a flat \$60 per pupil increase again and with the revenue limit calculated for the 2002-03 school year. The bill also directs DPI to encourage school districts to accommodate this reduction in the revenue limit increase without negatively affecting their instructional programs.

clows a school board to

The people of the state of Wisconsin, represented in senate and assembly, do enact as follows:

overvide this change by a two

SECTION 1. 20.255 (2) (ac) of the statutes, as affected by 2001 Wisconsin Act 16,

20.255 (2) (ac) General equalization aids. A sum sufficient for the payment of educational aids under ss. 121.08, 121.09, and 121.105 and subch. VI of ch. 121 equal to \$3,767,893,500 \$4,070,645,900 in the 1999-2000 2002-03 fiscal year and equal to the amount determined by the joint committee on finance under s. 121.15 (3m) (c) in each the 2004-05 fiscal year thereafter.

SECTION 2. 121.07 (7) (a) of the statutes is amended to read:

121.07 (7) (a) The "primary guaranteed valuation per member" is \$2,000,000 \$1,500,000.

SECTION 3. 121.15 (3m) (a) 1. of the statutes, as affected by 2001 Wisconsin Act 16, is renumbered 121.15 (3m) (a) 1. (intro.) and amended to read:

121.15 (3m) (a) 1. (intro.) "Partial school revenues" means the sum of state school aids, other than the amounts appropriated under s. 20.255 (2) and (cv), property taxes levied for school districts and aid paid to school districts under s. 79.095 (4), less the all of the following:

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1	a. The amount of any revenue limit increase under s. 121.91 (4) (a) 2. due to a
2	school board's increasing the services that it provides by adding responsibility for
3	providing a service transferred to it from another school board, less the.
4	b. The amount of any revenue limit increase under s. 121.91 (4) (a) 3., less the
5	c. The amount of any revenue limit increase under s. 121.91 (4) (j), less the
6	d. The amount of any revenue limit increase under s. 121.91 (4) (h), less the.
7	e. The amount of any property taxes levied for the purpose of s. 120.13 (19), and
8	<del>less an</del> .
9	f. An amount equal to 45% of the amount estimated to be paid under s. 119.23
10	(4) and (4m).
11	SECTION 4. 121.15 (3m) (a) 1. g. of the statutes is created to read:
12	121.15 (3m) (a) 1. g. The amount by which the property tax levy for debt service
13	on debt that has been approved by a referendum exceeds \$490,000,000.
14	SECTION 5. 121.15 (3m) (c) of the statutes is amended to read:
15	121.15 (3m) (c) By June 30, 1999 2004, and annually biennially by June 30
16	thereafter, the joint committee on finance shall determine the amount appropriated
17	under s. 20.255 (2) (ac) in the following school year.
18	SECTION 6. 121.91 (2m) (e) 2. of the statutes is repealed.
19	SECTION 7. 121.91 (2m) (e) 3. of the statutes is amended to read:
20	121.91 (2m) (e) 3. Add the result under subd. 1. \$60 to the result under subd.
21	21
22	SECTION 8. 121.91 (8) of the statutes is created to read:
23	(c)  121.9148) The department shall encourage school districts to accommodate the

reduction in the revenue limit increase resulting from 2001 Wisconsin Act

	runder paragraph (b)
	without negatively affecting their instructional programs and shall provide
2	technical assistance to school districts for that purpose.
3	Section 9340. Initial applicability; public instruction.
4	(1) REVENUE LIMIT. The treatment of section 121:91 (2m) (e) 2. and 3. of the
5	statutes first applies to the calculation of a school district's revenue limit for the
6	2002–03 school year.
7	$\mathcal{L}$ Primary guaranteed valuation. The treatment of section 121.07 (7) (a) of
8	the statutes first applies to school aid paid in the 2002-03 school year.
9	SECTION 9440. Effective dates; public instruction.
10	(1) GENERAL SCHOOL AID. The treatment of section 20.255 (2) (ac) of the statutes
11	takes effect on July 1, 2002.
12	(ENID)

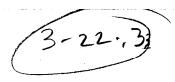
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## NONSTAT SESSLAW

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(a) In this rector :
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meaning given in section 121.90 (1) of the gratures.
, ,
2. "Revenue" has the meaning given
in section 121.90 (Im) of the statutes.
31. "State and" has the meaning given
121.90 (2) of the statutes



Section #. T21.91 (2m) (e) of the statutes

(b) Notwithstanding section 121.91 (2m) (e) of the Authors,

121791 (2m) (e) Except as provided in substant (2) and (4), no school district may increase its revenues for the 1999420000 school year exfer any school year thereafter to an amount that exceeds the amount calculated as follows:

Divide the sum of the amount of state aid received in the previous school year and property taxes levied for the previous school year, excluding property taxes levied for the purpose of 120.13

(19) and excluding funds described under span (4) (c), by the average of the number of pupils enrolled in the 3 previous school years.

2. Multiply the amount of the revenue increase per pupil allowed under this subsection for the previous school year by the sum of 1.0 plus the allowable rate of increase under s. 73.0305 expressed as a decimal.

Add the result under subd. I to the result under subd. 25 subdivision 1. a

Multiply the result under sand by the average of the number of pupils enrolled in the current and the 2 preceding school years.

History: 1993 a. 16; 1995 a. 27 ss. 4108m to 4114, 9145 (1); 1997 a. 27, 113, 164, 237, 286; 1999 a. 9, 17, 19, 32, 182; 2001 a. 16.

(2. This paragraph dues not apply if a school board adopts a resulution to that effect by a two-thirds vote of the members elect.

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(b) This subsection does not apply if
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1	Section 9440. Effective	ve dates; public instruction.
2	(1) GENERAL SCHOOL AID.	. The treatment of section 20.255 (2) (ac) of the statutes
3	takes effect on July 1, 2002.	
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#### **Grant, Peter**

From:

Hanle, Bob

Sent:

Friday, January 11, 2002 5:32 PM

To: Cc: Grant, Peter

Subject:

Miller, Steve Draft 4490-4

Please make the following changes to LRB 4490-4:

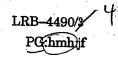
- In Section 1, change the appropriation amount from \$4,070,645,900 to \$4,200,645,900 (the intent now is to only cut the appropriation by \$20,000,000).
- In Section 9140 (1), change the \$60 to \$210.

Call me if you have any questions (6-1037).



2

### State of Misconsin 2001 - 2002 LEGISLATURE



DOA:.....Hanle - School aid and school district revenue limit

FOR 2001-03 BUDGET — NOT READY FOR INTRODUCTION

AN ACT ...; relating to: general school aid, school district revenue limits, and making an appropriation.

# Analysis by the Legislative Reference Bureau EDUCATION

#### PRIMARY AND SECONDARY EDUCATION

Under current law, annually the state determines how much general school aid to appropriate to ensure that partial school aid (general school aid and the property tax levy) equals two—thirds of state school aids (general school aids, certain categorical aids, and the school levy tax credit). In other words, the state determines how much general school aid to appropriate to pay two—thirds of statewide school costs (two—thirds funding).

This bill excludes from the definition of partial school revenues the amount by which the property tax levy for debt service on debt approved by a referendum exceeds \$490,000,000. The effect of this provision is to lower the amount of aid needed to meet two-thirds funding.

Under the current three—tiered school aid formula, the first tier of support is for costs shared between the state and school district up to a primary cost ceiling of \$1,000 per pupil. The state's share at this level is calculated using a guaranteed property valuation of \$2,000,000 per pupil. Every school district is guaranteed no less in general aid than this primary aid amount. This bill reduces this primary guarantee to \$1,500,000.

Current law generally limits the increase in the total amount of revenue per pupil that a school district may receive from general school aids and property taxes in a school year to the amount of revenue increase allowed per pupil in the previous school year increased by the percentage change in the consumer price index. This bill replaces the inflation—based adjustment with a flat \$60 per pupil increase for the revenue limit calculated for the 2002—03 school year, although the bill allows a school board to override this change by a two—thirds vote. The bill directs DPI to encourage school districts to accommodate this reduction in the revenue limit increase without negatively affecting their instructional programs.

## The people of the state of Wisconsin, represented in senate and assembly, do enact as follows:

SECTION 1. 20.255 (2) (ac) of the statutes, as affected by 2001 Wisconsin Act 16, 1 2 is amended to read: 20.255 (2) (ac) General equalization aids. A sum sufficient for the payment of 3 educational aids under ss. 121.08, 121.09, and 121.105 and subch. VI of ch. 121 equal 4 to \$3,767,893,500 \$4,070,645,900 in the 1999-2000 2002-03 fiscal year and equal to 5 the amount determined by the joint committee on finance under s. 121.15 (3m) (c) in 6 7 each the 2004-05 fiscal year thereafter. 8 SECTION 2. 121.07 (7) (a) of the statutes is amended to read: 121.07 (7) (a) The "primary guaranteed valuation per member" is \$2,000,000 9 10 **\$1,500,000**. SECTION 3. 121.15 (3m) (a) 1. of the statutes, as affected by 2001 Wisconsin Act 11 16, is renumbered 121.15 (3m) (a) 1. (intro.) and amended to read: 12 121.15 (3m) (a) 1. (intro.) "Partial school revenues" means the sum of state 13 school aids, other than the amounts appropriated under s. 20.255 (2) and (cv), 14 property taxes levied for school districts and aid paid to school districts under s. 15 16 79.095 (4), less the all of the following:

-	a. The amount of any revenue limit increase under s. 121.91 (4) (a) 2. due to a
2	school board's increasing the services that it provides by adding responsibility for
3	providing a service transferred to it from another school board, less the.
4	b. The amount of any revenue limit increase under s. 121,91 (4) (a) 3., less the.
5	c. The amount of any revenue limit increase under s. 121.91 (4) (j), less the.
6	d. The amount of any revenue limit increase under s. 121.91 (4) (h), less the.
7	e. The amount of any property taxes levied for the purpose of s. 120.13 (19), and
8	<del>less an</del> .
9	f. An amount equal to 45% of the amount estimated to be paid under s. 119.23
10	(4) and (4m).
11	SECTION 4. 121.15 (3m) (a) 1. g. of the statutes is created to read:
12	121.15 (3m) (a) 1. g. The amount by which the property tax levy for debt service
13	on debt that has been approved by a referendum exceeds \$490,000,000.
14	SECTION 5. 121.15 (3m) (c) of the statutes is amended to read:
15	121.15 (3m) (c) By June 30, 1999 2004, and annually biennially by June 30
16	thereafter, the joint committee on finance shall determine the amount appropriated
17	under s. 20.255 (2) (ac) in the following school year.
18	Section 9140. Nonstatutory provisions; public instruction.
19	(1) REVENUE LIMIT. (a) In this section:
20	1. "Number of pupils enrolled" has the meaning given in section 121.90 (1) of
21	the statutes.
22	2. "Revenue" has the meaning given in section 121.90 (1m) of the statutes.
23	3. "State aid" has the meaning given in section 121.90 (2) of the statutes.

SECTION 9140

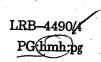
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1	(a) (b) My Notwithstanding section 121.91 (2m) (e) of the statutes, (a) (2m)
2	provided in subdivision-2 no school district may increase its novemest for the
3	2662 63 school-year to an amount that exceeds the amount calculated as follows:
4	a. Divide the sum of the amount of state aid received in the previous school-year
5	and property taxes levied for the previous school year, excluding property taxes
6	levied for the purpose of section 120.13 (19) and excluding funds described under
7	section 121.91 (4) (c), by the average of the number of pupils enrolled in the 3 previous
. 8	school years.
9	Add \$60 to the result under subdivision 1.
10	c. Multiply the result under subdivision 1. b. by the average of the number of
11	pupils enrolled in the current and the 2 preceding school-years.
12	This paragraph does not apply if a school board adopts a resolution to that
13	effect by a two-thirds vote of the members elect.
14	(b) The department shall encourage school districts to accommodate the
15	reduction in the revenue limit increase under paragraph (without negatively
16	affecting their instructional programs and shall provide technical assistance to
17	school districts for that purpose.
18	(c) Notwithstanding paragraph for the purpose of calculating a school
19	district's revenue limit for the 2003-04 school year, the revenue increase per pupil
20	allowed for the 2002-03 school year under section 121.91 (2m) (e) 2. of the statutes
21	shall be \$226.68 multiplied by the sum of 1.0 plus the allowable rate of increase under
22	section 73.0305 of the statutes expressed as a decimal.
23	SECTION 9340. Initial applicability; public instruction.
24	(1) PRIMARY GUARANTEED VALUATION. The treatment of section 121.07 (7) (a) of

the statutes first applies to school aid paid in the 2002-03 school year.

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## State of Misconsin 2001 - 2002 LEGISLATURE



DOA:.....Hanle – School aid and school district revenue limit

FOR 2001-03 BUDGET — NOT READY FOR INTRODUCTION

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AN ACT ...; relating to: general school aid, school district revenue limits, and

making an appropriation.

# Analysis by the Legislative Reference Bureau EDUCATION

#### PRIMARY AND SECONDARY EDUCATION

Under current law, annually the state determines how much general school aid to appropriate to ensure that partial school aid (general school aid and the property tax levy) equals two—thirds of state school aids (general school aids, certain categorical aids, and the school levy tax credit). In other words, the state determines how much general school aid to appropriate to pay two—thirds of statewide school costs (two—thirds funding).

This bill excludes from the definition of partial school revenues the amount by which the property tax levy for debt service on debt approved by a referendum exceeds \$490,000,000. The effect of this provision is to lower the amount of aid needed to meet two-thirds funding.

Under the current three—tiered school aid formula, the first tier of support is for costs shared between the state and school district up to a primary cost ceiling of \$1,000 per pupil. The state's share at this level is calculated using a guaranteed property valuation of \$2,000,000 per pupil. Every school district is guaranteed no less in general aid than this primary aid amount. This bill reduces this primary guarantee to \$1,500,000.

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Current law generally limits the increase in the total amount of revenue per pupil that a school district may receive from general school aids and property taxes in a school year to the amount of revenue increase allowed per pupil in the previous school year increased by the percentage change in the consumer price index. This bill replaces the inflation-based adjustment with a flat some pupil increase for the revenue limit calculated for the 2002-03 school year, although the bill allows a school board to override this change by a two-thirds vote. The bill directs DPI to encourage school districts to accommodate this reduction in the revenue limit increase without negatively affecting their instructional programs.

The people of the state of Wisconsin, represented in senate and assembly, do enact as follows:

#4,200,645,900 SECTION 1. 20.255 (2) (ac) of the statutes, as affected by 2001 Wisconsin Act 16, 1 2 is amended to read: 20.255 (2) (ac) General equalization aids. A sum sufficient for the payment of educational aids under ss. 121.08, 121.09, and 121.105 and subch. VI of ch. 121 equal to \$3,767,893,500 \$4,070,645,900 in the 1999-2000 2002-03 fiscal year and equal to the amount determined by the joint committee on finance under s. 121.15 (3m) (c) in each the 2004-05 fiscal year thereafter. SECTION 2. 121.07 (7) (a) of the statutes is amended to read:

121.07 (7) (a) The "primary guaranteed valuation per member" is \$2,000,000 **\$1,500,000**.

SECTION 3. 121.15 (3m) (a) 1. of the statutes, as affected by 2001 Wisconsin Act 16, is renumbered 121.15 (3m) (a) 1. (intro.) and amended to read:

121.15 (3m) (a) 1. (intro.) "Partial school revenues" means the sum of state school aids, other than the amounts appropriated under s. 20.255 (2) and (cv), property taxes levied for school districts and aid paid to school districts under s. 79.095 (4), less the all of the following:

I.	a. The amount of any revenue limit increase under s. 121.91 (4) (a) 2. due to a
2	school board's increasing the services that it provides by adding responsibility for
3	providing a service transferred to it from another school board, less the.
4	b. The amount of any revenue limit increase under s. 121.91 (4) (a) 3., less the.
5	c. The amount of any revenue limit increase under s. 121.91 (4) (j), less the.
6	d. The amount of any revenue limit increase under s. 121.91 (4) (h), less the
7	e. The amount of any property taxes levied for the purpose of s. 120.13 (19), and
8	less an.
9	f. An amount equal to 45% of the amount estimated to be paid under s. 119.23
10	(4) and (4m).
11	SECTION 4. 121.15 (3m) (a) 1. g. of the statutes is created to read:
12	121.15 (3m) (a) 1. g. The amount by which the property tax levy for debt service
13	on debt that has been approved by a referendum exceeds \$490,000,000.
14	SECTION 5. 121.15 (3m) (c) of the statutes is amended to read:
15	121.15 (3m) (c) By June 30, 1999 2004, and annually biennially by June 30
16	thereafter, the joint committee on finance shall determine the amount appropriated
17	under s. 20.255 (2) (ac) in the following school year.
18	SECTION 9140. Nonstatutory provisions; public instruction.
19	(1) REVENUE LIMIT. (a) Notwithstanding section 121.91 (2m) (e) 2. and 3. of the
20	statutes, in determining a school district's revenue limit for the 2002–03 school year,
21	only shall be added to the result under section 121.91 (2m) (e) 1. of the statutes.
22	This paragraph does not apply if a school board adopts a resolution to that effect by
23	a two-thirds vote of the members elect.
24	(b) The department shall encourage school districts to accommodate the
25	reduction in the revenue limit increase under paragraph (a) without negatively

1	affecting their instructional programs and shall provide technical assistance to
2	school districts for that purpose.
3	(c) Notwithstanding paragraph (a), for the purpose of calculating a school
4	district's revenue limit for the 2003-04 school year, the revenue increase per pupil
5	allowed for the 2002-03 school year under section 121.91 (2m) (e) 2. of the statutes
6	shall be \$226.68 multiplied by the sum of 1.0 plus the allowable rate of increase under
7	section 73.0305 of the statutes expressed as a decimal.
8	Section 9340. Initial applicability; public instruction.
9	(1) PRIMARY GUARANTEED VALUATION. The treatment of section 121.07 (7) (a) of
10	the statutes first applies to school aid paid in the 2002-03 school year.
11	Section 9440. Effective dates; public instruction.
12	(1) GENERAL SCHOOL AID. The treatment of section 20.255 (2) (ac) of the statutes
13	takes effect on July 1, 2002.
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#### **Grant, Peter**

From:

Hanle, Bob

Sent:

Monday, January 14, 2002 1:41 PM

To: Subject: Grant, Peter 4490 again

Importance:

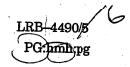
High

Since we've reduced the aid reduction from \$150 million to \$20 million, we need to modify the reduction to the primary guarantee.

Please redraft Section 2 of LRB-4490 to increase the primary guarantee from \$1,500,000 to \$1,930,000. Sorry I forgot about this when I initially requested the redraft. Thanks.



### State of Misconsin 2001 - 2002 LEGISLATURE



DOA:.....Hanle - School aid and school district revenue limit

FOR 2001-03 BUDGET — NOT READY FOR INTRODUCTION

1 AN ACT ... relating to: general

An ACT ...; relating to: general school aid, school district revenue limits, and

making an appropriation.

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SECTION 1. 20.255 (2) (ac) of the statutes, as affected by 2001 Wisconsin Act 16. 1 2 is amended to read: 20.255 (2) (ac) General equalization aids. A sum sufficient for the payment of 3 educational aids under ss. 121.08, 121.09, and 121.105 and subch. VI of ch. 121 equal 4 to \$3,767,893,500 \$4,200,645,900 in the 1999-2000 2002-03 fiscal year and equal to the amount determined by the joint committee on finance under s. 121.15 (3m) (c) in 7 each the 2004-05 fiscal year thereafter. SECTION 2. 121.07 (7) (a) of the statutes is amended to read: 121.07 (7) (a) The "primary guaranteed valuation per member" is \$2,000,000 10 1,930,000 SECTION 3. 121.15 (3m) (a) 1. of the statutes, as affected by 2001 Wisconsin Act 11 12 16, is renumbered 121.15 (3m) (a) 1. (intro.) and amended to read: 121.15 (3m) (a) 1. (intro.) "Partial school revenues" means the sum of state 13 school aids, other than the amounts appropriated under s. 20.255 (2) and (cv), 14 property taxes levied for school districts and aid paid to school districts under s. 15 16 79.095 (4), less the all of the following:

adding responsibility for board <del>, less the</del> . s. 121.91 (4) (a) 3. <del>, less the</del> . s. 121.91 (4) (j) <del>, less the</del> .
s. 121.91 (4) (a) 3. <del>, less the</del>
s. 121.91 (4) (j) <del>, less the</del> .
s. 121.91 (4) (h) <del>, less the</del> .
rpose of s. 120.13 (19) <del>, and</del>
to be paid under s. 119.23
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the 2002–03 school year,
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esolution to that effect by
cts to accommodate the

,1	affecting their instructional programs and shall provide technical assistance to
2	school districts for that purpose.
3	(c) Notwithstanding paragraph (a), for the purpose of calculating a school
4	district's revenue limit for the 2003-04 school year, the revenue increase per pupil
5	allowed for the 2002-03 school year under section 121.91 (2m) (e) 2. of the statutes
6	shall be \$226.68 multiplied by the sum of 1.0 plus the allowable rate of increase under
7	section 73.0305 of the statutes expressed as a decimal.
8	SECTION 9340. Initial applicability; public instruction.
9	(1) PRIMARY GUARANTEED VALUATION. The treatment of section 121.07 (7) (a) of
10	the statutes first applies to school aid paid in the 2002-03 school year.
11	Section 9440. Effective dates; public instruction.
12	(1) GENERAL SCHOOL AID. The treatment of section 20.255 (2) (ac) of the statutes
13	takes effect on July 1, 2002.

(END)



### State of Misconsin 2001 - 2002 LEGISLATURE

LRB-4490/6
PG:hmh:ch

DOA:.....Hanle - School aid and school district revenue limit

FOR 2001-03 BUDGET — NOT READY FOR INTRODUCTION

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AN ACT ...; relating to: general school aid, school district revenue limits, and

making an appropriation.

# Analysis by the Legislative Reference Bureau EDUCATION

#### PRIMARY AND SECONDARY EDUCATION

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Under the current three-tiered school aid formula, the first tier of support is for costs shared between the state and school district up to a primary cost ceiling of \$1,000 per pupil. The state's share at this level is calculated using a guaranteed property valuation of \$2,000,000 per pupil. Every school district is guaranteed no less in general aid than this primary aid amount. This bill reduces this primary guarantee to \$2,000.

#1, 930, 050

Current law generally limits the increase in the total amount of revenue per pupil that a school district may receive from general school aids and property taxes in a school year to the amount of revenue increase allowed per pupil in the previous school year increased by the percentage change in the consumer price index. This bill replaces the inflation—based adjustment with a flat \$210 per pupil increase for the revenue limit calculated for the 2002—03 school year, although the bill allows a school board to override this change by a two—thirds vote. The bill directs DPI to encourage school districts to accommodate this reduction in the revenue limit increase without negatively affecting their instructional programs.

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1	a. The amount of any revenue limit increase under s. 121.91 (4) (a) 2. due to a
2	school board's increasing the services that it provides by adding responsibility for
3	providing a service transferred to it from another school board, less the.
4	b. The amount of any revenue limit increase under s. 121.91 (4) (a) 3., less the
5	c. The amount of any revenue limit increase under s. 121.91 (4) (j), less the.
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7	e. The amount of any property taxes levied for the purpose of s. 120.13 (19), and
8	<del>less an</del> .
9	f. An amount equal to 45% of the amount estimated to be paid under s. 119.23
10	(4) and (4m).
11	SECTION 4. 121.15 (3m) (a) 1. g. of the statutes is created to read:
12	121.15 (3m) (a) 1. g. The amount by which the property tax levy for debt service
13	on debt that has been approved by a referendum exceeds \$490,000,000.
14	Section 5. 121.15 (3m) (c) of the statutes is amended to read:
15	121.15 (3m) (c) By June 30, <del>1999</del> 2004, and <del>annually biennially</del> by June 30
16	thereafter, the joint committee on finance shall determine the amount appropriated
17	under s. 20.255 (2) (ac) in the following school year.
18	Section 9140. Nonstatutory provisions; public instruction.
19	(1) REVENUE LIMIT. (a) Notwithstanding section 121.91 (2m) (e) 2. and 3. of the
20	statutes, in determining a school district's revenue limit for the 2002-03 school year,
21	only \$210 shall be added to the result under section 121.91 (2m) (e) 1. of the statutes.
22	This paragraph does not apply if a school board adopts a resolution to that effect by
23	a two-thirds vote of the members elect.
24	(b) The department shall encourage school districts to accommodate the
25	reduction in the revenue limit increase under paragraph (a) without negatively

1	affecting their instructional programs and shall provide technical assistance to
2	school districts for that purpose.
3	(c) Notwithstanding paragraph (a), for the purpose of calculating a school
4	district's revenue limit for the 2003-04 school year, the revenue increase per pupil
5	allowed for the 2002-03 school year under section 121.91 (2m) (e) 2. of the statutes
6	shall be \$226.68 multiplied by the sum of 1.0 plus the allowable rate of increase under
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12	(1) GENERAL SCHOOL AID. The treatment of section 20.255 (2) (ac) of the statutes
13	takes effect on July 1, 2002.
14	(END)



### State of Misconsin 2001 - 2002 LEGISLATURE

LRB-4490/7 PG:hmh;ch

DOA:.....Hanle – School aid and school district revenue limit

FOR 2001-03 BUDGET — NOT READY FOR INTRODUCTION

1 AN ACT ...; relating to: general school aid, school district revenue limits, and

2 making an appropriation.

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a. The amount of any revenue limit increase under s. 121.91 (4) (a) 2. due to a
school board's increasing the services that it provides by adding responsibility for
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b. The amount of any revenue limit increase under s. 121.91 (4) (a) 3., less the
c. The amount of any revenue limit increase under s. 121.91 (4) (j), less the.
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e. The amount of any property taxes levied for the purpose of s. 120.13 (19), and
<del>less an</del> .
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121.15 (3m) (a) 1. g. The amount by which the property tax levy for debt service
on debt that has been approved by a referendum exceeds \$490,000,000.
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thereafter, the joint committee on finance shall determine the amount appropriated
under s. 20.255 (2) (ac) in the following school year.
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(1) REVENUE LIMIT.
(a) Notwithstanding section 121.91 (2m) (e) 2. and 3. of the statutes, in
determining a school district's revenue limit for the 2002-03 school year, only \$210
shall be added to the result under section 121.91 (2m) (e) 1. of the statutes. This
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	reduction in the revenue limit increase under paragraph (a) without negatively
	affecting their instructional programs and shall provide technical assistance to
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